

**IN THE CLAIMS:**

1 1. (Currently Amended) A financial services outsourcing method for facilitating out-  
2 sourcing of tax return preparation services for numerous clients on behalf of plural direct  
3 service providers serving the numerous clients, the financial services being outsourced to  
4 a given outsourcing group, the clients comprising a first set of clients in a first country,  
5 having tax return filing obligations for the first country, and comprising a second set of  
6 clients in a second country having tax return filing obligations for the second country, the  
7 method comprising:

8 for plural respective direct service providers, loading, onto a remotely accessible  
9 part of a common host server, client specific financial files and corresponding reference  
10 materials, the host server providing access to a remote computer client of information  
11 concerning the ~~ultimate~~ client specific financial files and corresponding reference materi-  
12 als;

13 ~~retaining-preparing outsourced personnel to prepare~~ tax returns for the clients of  
14 the direct service providers by outsourced personnel, the outsourced personnel ~~preparing~~  
15 ~~the tax returns while~~ located outside the first and second countries;

16 providing the outsourced personnel limited access to the server;

17 the outsourced personnel preparing the tax returns through a remote limited ac-  
18 cess client located outside the first and second countries connected to the host server;  
19 and,

20 monitoring and reporting ~~the~~ a status of the tax returns preparation ~~financial ser-~~  
21 ~~vice project~~.

1 2. (Original) The method according to claim 1, wherein the tax return preparation ser-  
2 vices comprise individual tax return preparation services.

1 3. (Original) The method according to claim 1, wherein the tax returns are outsourced  
2 through an intermediary firm to the outsourced personnel.

- 1 4. (Currently Amended) The method according to claim 3, further comprising the inter-  
2 mediary ~~service~~-firm interacting with the outsourced personnel through use of a servicing  
3 computer system, and interacting with the plural direct service providers through use of  
4 the servicing computer system.
- 1 5. (Original) The method according to claim 3, wherein the direct service providers com-  
2 prise accounting firms.
- 1 6. (Original) The method according to claim 1, wherein the host server provides limited  
2 screen shot access to the remote client computer of information concerning the client  
3 specific financial files and corresponding reference materials.
- 1 7. (Original) The method according to claim 6, wherein the host server comprises a CI-  
2 TRIX server.
- 1 8. (Currently Amended) The method according to claim 2, wherein the host server pro-  
2 vides limited screen shot access to the remote client computer of information concerning  
3 the ~~ultimate~~-client specific financial files and corresponding reference materials.
- 1 9. (Original) The method according to claim 8, wherein the host server comprises a CI-  
2 TRIX server.
- 1 10. (Original) The method according to claim 1, wherein the host server comprises an  
2 ASP server running tax software for use by plural independent direct service providers  
3 provided with access to the ASP server.
- 1 11. (Original) The method according to claim 2, wherein the host server comprises an  
2 ASP server running tax software for use by plural independent direct service providers  
3 provided with access to the ASP server.

- 1 12. (Original) The method according to claim 1, wherein the corresponding reference ma-  
2 terials comprise image files of physical reference materials.
- 1 13. (Original) The method according to claim 1, wherein the client specific financial files  
2 and corresponding reference materials comprise tax filer specific tax file and image files.
- 1 14. (Original) The method according to claim 13, further comprising loading onto the  
2 remotely accessible part of the host server tax preparation software.
- 1 15. (Original) The method according to claim 1, wherein the outsourced personnel pre-  
2 pare tax returns while located in India.
- 1 16. (Original) The method according to claim 1, further comprising a given direct service  
2 provider interviewing a tax filer and obtaining supporting documentation for the tax  
3 filer's tax return.
- 1 17. (Original) The method according claim 16, wherein the direct service provider com-  
2 prises an accounting firm.
- 1 18. (Original) The method according to claim 16, wherein the supporting documentation  
2 comprises the last season tax return as filed, receipt, and summary information regarding  
3 finances of the tax filer.
- 1 19. (Original) The method according to claim 18, further comprising the given direct ser-  
2 vice provider setting up a tax file compatible with a given tax software package, and ren-  
3 dering the supporting documentation electronic.
- 1 20. (Original) The method according to claim 19, wherein rendering the supporting docu-  
2 mentation electronic comprises scanning supporting documents into image files.